ED 324 303 SP 032 640

AUTHOR Packard, Richard D.
TITLE A Holistic Approach to Evaluation: Assessment of the Organizational Effectiveness of Total School Systems & Their Impact on Improving Instructional Leadership, Teacher Skills & Student Learning.
INSTITUTION Northern Arizona Univ., Flagstaff. Center for Excellence in Education.
PUB DATE Jul 90
NOTE 17p.; Paper presented at the World Assembly of the International Council on Education for Teaching (Singapore, July 27-31, 1990).
PUB TYPE Speeches/Conference Papers (150) -- Reports - Descriptive (141)

EDRS PRICE MF01/PC01 Plus Postage.
DESCRIPTORS Educational Change; Educational Finance; Educational Research; Elementary Secondary Education; *Holistic Approach; *Organizational Climate; Professional Recognition; *Program Evaluation; *Program Improvement; *School Districts; *School Restructuring; Teacher Motivation

ABSTRACT

The Center for Excellence in Education at Northern Arizona University has learned a great deal from the past 5 years of research and evaluation of 15 pilot-test school districts, as they endeavor to restructure and make positive changes. The purpose of the reform movement is to provide adequate incentives for recruitment, retention, and motivation of high-quality professionals and to improve student learning. This extensive study has found an extreme diversity in the readiness and ability of school districts to reform and improve. The studies have identified several important factors impacting upon each organization from the outside (school boards and legislative policy) and from within (organizational climate, communication, teacher evaluation, and curriculum). These interrelated components directly affect productivity and must be integrated and operating in a positive way to influence teacher development and student learning. Organizations that have done an assessment based on key components and redesigned operations to focus on the instructional program have improved teacher attitudes, skills, and leadership activities and dramatically increased student achievement. Those systems which have accomplished total organizational development and integration are now appropriately rewarding professionals on the basis of performance (tied to student learning), rather than solely on years of experience. (Author)

****
* Reproductions supplied by EDRS are the best that can be made *
* from the original document. *
****

ED324303

A HOLISTIC APPROACH TO EVALUATION:

Assessment of the Organizational Effectiveness of Total School Systems & Their Impact on Improving Instructional Leadership, Teacher Skills & Student Learning

"PERMISSION TO REPRODUCE THIS MATERIAL HAS BEEN GRANTED BY

R D. Packard

TO THE EDUCATIONAL RESOURCES INFORMATION CENTER (ERIC)."

U.S. DEPARTMENT OF EDUCATION
Office of Educational Research and Improvement
EDUCATIONAL RESOURCES INFORMATION CENTER (ERIC)

☐ This document has been reproduced as received from the person or organization originating it.

☐ Minor changes have been made to improve reproduction quality.

• Points of view or opinions stated in this document do not necessarily represent official OERI position or policy.

by:

Dr. Richard D. Packard,
Professor
CEE - Research Division
Northern Arizona University
Flagstaff, Arizona 86011
Ph: (602) 523-5852

Paper presented to:

The International Council on Education For Teaching - 1990 World Assembly

Theme:

"Improving the Quality of the Teaching Profession: National, Regional & International Cooperation"
Singapore, Republic of Singapore
July 27-31, 1990

SP032 640

Dr. Richard D. Packard, Director
The Arizona Career Ladder Research
& Evaluation Project
Center for Excellence in Education
Northern Arizona University
Flagstaff, Arizona 86011
Ph: (602) 523-5852

ABSTRACT

Assessment of the Organizational Effectiveness of Total School Systems & Their Impact on Improving Instructional Leadership, Teacher Skills & Student Learning

The Center for Excellence in Education at Northern Arizona University has learned a great deal from the past five years of research & evaluation of 15 pilot-test school districts, as they endeavor to re-structure and make positive changes. The purpose of the reform movement is to provide adequate incentives for recruitment, retention and motivation of high-quality professionals and to improve student learning. This extensive study has found that there is an extreme diversity in the readiness of districts in their ability to reform and improve. The researchers have identified several important factors impacting each organization from the outside (i.e., school boards & legislative policy) and from within (i.e., organizational climate, communication, teacher evaluation & curriculum). These interrelated components directly affect productivity and must be integrated and operating in a positive way to influence teacher development and student learning. Based on assessment of key components, organizations which have re-designed operations to focus on the instructional program have improved teacher attitudes, skills and leadership activities and dramatically increased student achievement. Those systems which have accomplished total organizational development and integration are now appropriately rewarding professionals on the basis of performance (tied to student learning), rather than solely on years of experience.

Table of Contents

Page

Assessment of the Organizational Effectiveness of Total School Systems & Their Impact on Improving Instructional Leadership, Teacher Skills & Student Learning 1

Overview. 1

Conditions for Effectiveness 1

The Issue of Accountability. 1

A Holistic Approach to Evaluative Assessment of Individuals, Programs, Organizational Functions & Performance. 2

Assessing and Profiling Organizational Readiness for Educational Accountability 2

Essential Interrelated Characteristics of Effective Schools: Focus Factors. 4

Student Achievement (Production & Outcomes). 4

Curriculum/Instruction/Measurement of Learning 4

Curriculum 4

Instruction 4

Measurement of Student Learning 5

Teacher Skills Development & Leadership 5

Teacher Skills Development 5

Teacher Leadership 5

Administrator Skills Development & Leadership 5

Administrator Skills Development 6

Administrator Leadership 6

Essential Interrelated Characteristics of Effective Schools: Support Factors 6

Teacher & Administrator Evaluation 6

Motivation: Extrinsic & Intrinsic 6
Motivation: Extrinsic 6
Motivation: Intrinsic 7
Local Finance & Funding (Salary Schedule) 7
District Research & Development (Program Evaluation) 7
Professional Input (Ownership) 8
Program Designs & Structures 8
Local Governing Board (Understanding & Support) 8
Organizational Climate, Communication & Morale 9
Assessment of Readiness Levels for Reform, Positive Change, & Improvement 9
Change & Improvement (Long-Range Plans) 9
District Readiness Level (Assessment) 10
Support of Outside Forces Impacting Teacher Development & Student Achievement 10
Professional Networks 10
State Finance & Funding (Salary Schedule) 10
State Governing Board (Accountability/Implementation) 11
Legislative Guidelines 11
Analysis of Research Variables, Program Evaluation & Improvement 11
Summary 11

Assessment of the Organizational Effectiveness of Total School Systems & Their Impact on Improving Instructional Leadership, Teacher Skills & Student Learning

Overview

The Center for Excellence in Education at Northern Arizona University has learned a considerable amount from the past five years of research & evaluation of 15 pilot-test school districts, as they endeavor to restructure and make positive changes. The purpose of the reform movement is to provide adequate incentives for recruitment, retention and motivation of high-quality professionals and to improve student learning. This extensive study has found that there is an extreme diversity in the readiness of districts with respect to their ability to reform and improve. The researchers have identified several important factors impacting each organization from the outside (i.e., school boards & legislative policy) and from within (i.e., organizational climate, communication, teacher evaluation & curriculum). These interrelated components directly affect productivity and must be integrated and operating in a positive way in order to influence teacher development and student learning. Based on assessment of key components, organizations which have redesigned their operations to focus on the instructional program have improved teacher attitudes, skills and leadership activities and dramatically increased student achievement. Those systems which have accomplished total organizational development and integration are now appropriately rewarding professionals on the basis of performance which is directly tied to student learning, rather than solely on years of experience.

Conditions for Effectiveness. In their research, Packard and Dereshiwsky (1990, January) have identified several conditions which determine the level of effectiveness within and among districts. In order to become effective organizations which have the greatest impact on positive teacher development and student achievement, districts must recognize the necessity of developing total school system readiness. They are extremely unequal (*between* school systems) in their organizational capabilities and resources to impact student learning potentials. The researchers also found that organizational components (*within* school systems) exhibit varying capabilities and levels of resources to impact school goals. One inappropriately functioning component or negative factor can anchor and drag the others down or keep them from attaining the overall institutional goals.

The Issue of Accountability. Most school systems lack the necessary strategic planning, technological development and environmental readiness for effectively evaluating and tracing individual, program and organizational levels of operation and improvement throughout a long-range period. Accountability for effective school operations can only be achieved through implementation of valid

procedures for assessing, profiling and improving the total organization and its components. The following general steps are necessary prerequisites for an organizational entity to demonstrate complete accountability:

1. Objective and valid evaluation of the total school system, in particular the alignment of its curriculum with specific learning objectives, as an integral part of the planning phase for major change and restructuring

2. Identification of interrelationships of those key organizational components which can critically impact overall organizational goals

3. Ongoing assessment, profiling and integration of these key interrelated components, in order to maintain their proper alignment and focus on the overall organizational goals

4. Prompt initiation of corrective action for those elements currently showing weaknesses, through application of specific improvement procedures which meet local needs

Additional detail on the assessment and profiling procedure is provided in the following section. The objective and valid information obtained from this method is necessary in order for the organizational entity to achieve and maintain the necessary readiness level to implement complex and comprehensive reform programs successfully.

A Holistic Approach to Evaluative Assessment of Individuals, Programs, Organizational Functions & Performance

Past attempts at restructuring and reform in education have resulted in little actual progress. The customary procedure of evaluating and changing only one or two essential units within total systems, and assuming that this will be the answer to the problems of reaching organizational goals, has proven to be very wasteful. The five-year evaluation process developed by the researchers established a more holistic approach, which was not limited to assessing programs and organizational components in isolation, but instead recognized all of the interrelated elements which share responsibilities for affecting agency performance and goal attainment.

The first step in assessing performance at the individual, program or organizational level is to identify those specific elements which are to be evaluated, as well as their interrelationship in terms of overall goal-setting and attainment. It is often helpful to depict these key system components in diagrammatical form. Figure 1, in Appendix A, shows the interrelated *support* and *focus* factors of organizational structural components.

The actual assessment process consists of a series of sequential steps, as follows:

1. Collection of in-depth information on each element through use of all appropriate research procedures (e.g., quantitative data and inferential statistical tests in the case of evaluating gains in student achievement; vs. application of such qualitative methods as interviews, observations and open-ended written survey responses to assess organizational climate and communication)

2. Identifying the current operating *strengths* of each critical system component

3. Identifying the current operating *weaknesses/insufficiencies/areas of needed improvement* of each critical system component

4. Summarizing these "net" strengths and weaknesses for each component in the form of a *profile* (Figures 3 & 4, in Appendix A, depict an actual example of organizational component evaluation and profiling)

5. Based on results of this profiling procedure, formulating and implementing a remedial plan of action to improve those individual components which are currently at insufficient readiness levels to support overall goals (such as teacher development and student learning)

6. Placement of the organization and its individual members at levels of performance expectation which most closely correspond to their own current readiness and developmental levels. In other words, there needs to be a closer match between targeted objectives and present capabilities to reach those objectives. Specific examples at the individual (student and teacher) and overall system (district-wide) levels of this matching are as follows:

   a) a student who is currently assessed as reading on the 3rd-grade level should be challenged with developing reading skills which progress from that particular level -- not the 8th-grade level

   b) a teacher who is found to need assistance in teaching multiplication adequately should be inserviced and re-evaluated prior to being assigned to teach mathematics

   c) a district which does not presently have in place a valid curriculum, objectives and evaluation system should devote its energies to these priorities before attempting to classify its teaching staff according to different levels of performance in a credible manner

7. Undertaking a long-range (e.g., a 3- to 5-year period) documentation and formative/summative evaluation of the developmental progress of each component which has been targeted for change & improvement

8. Finally, conducting corresponding periodic review and monitoring of those components currently functioning at "operationally healthy" levels, in order to ensure their continued optimal focus and support of overall organizational goals

The preceding steps illustrate the continuous, cyclical nature of the assessment process. Potential problem areas within isolated areas of the total system may be spotted immediately, and targeted for change and improvement by use of the profiling procedure. Appropriate remedial action can then be initiated, in order to re-align the presently dysfunctional element(s) with the more satisfactorily operating areas of the system. In this manner, more realistic organizational and individual goals can be set for the short- and long-term which are most closely matched to current readiness and operational capabilities.

Assessing and Profiling Organizational Readiness for Educational Accountability

At the Arizona Educational Accountability Summit, the researchers (Packard & Dereshiwsky, 1990, April) discussed issues of accountability for the development of effective schools. The following section contains a summary of essential interrelated characteristics of effective school operations, identified for each key support and focus factor (Figure 1, Appendix A). All internal and external organizational factors must

be primarily focused on, and be held accountable for, student growth and learning. The focal point of student achievement depends on adequate support and development of the following factors.

Essential Interrelated Characteristics of Effective Schools: Focus Factors

STUDENT ACHIEVEMENT (PRODUCTION & OUTCOMES)

* Students are unequal with respect to maturation, motivation and past experience. In order to impact student development positively, it is necessary to understand the principles of human growth and learning, such as the following: (1) students have differing social, emotional and academic readiness levels; (2) learning proceeds at different rates; (3) growth and learning is a sequential, continuous and orderly process; (4) development is cumulative and begins from the point of past experience and learning.

  - Teachers should demonstrate accountability for their own students' achievement by learning how to pre- & post-test and assess gain scores

  - School- & district-wide emphasis on defining desired outcomes in traditionally "hard-to-quantify" areas, such as music, art & creative writing

  - Understanding & attention given to the social & emotional development of students, as being equally important to their cognitive/intellectual growth as academic course content

  - Explicit inclusion of "educational specialists" (e.g., school counselors & librarians) within the overall staff definition of professionals who significantly impact student learning on the cognitive, social & emotional levels

CURRICULUM/INSTRUCTION/MEASUREMENT OF LEARNING

* A valid and reliable curriculum is required in order to serve as a benchmark for assessing student progress and to meet state and local objectives for learning.

  Curriculum

  - Development of a valid curriculum which has been aligned specifically with local needs, objectives & conditions

  - Teacher & administrator awareness of the importance of such a sound overall curriculum development

  - Ongoing review & revision of curriculum

  - Direct input from involved outside parties such as parents & university faculty in preceding activities (curriculum development, alignment & review)

* Adequate instructional materials, methodology and technology are required to assist students in learning curricular content.

  Instruction

  - Focus on obtaining and/or developing top-quality classroom materials & instructional strategies geared to local needs, objectives & conditions

- Seeking, recognizing & rewarding individual creativity, initiative & input into development of such locally appropriate materials & methods

* In order to ensure accountability in the measurement and assessment of student progress, it is necessary to identify specific amounts of pre- and post-gains. Teachers must be aware of the different levels at which students began their learning process, how far they have advanced and what specific content is next in the curricular/developmental sequence.

Measurement of Student Learning

- School & district efforts to develop own norms for linking teacher performance to student achievement reliably

- Developing a variety of local, state & national tests & assessment procedures in all subject areas

TEACHER SKILLS DEVELOPMENT & LEADERSHIP

* Teachers must have the support of adequate inservice programs and incentives for development of classroom teaching skills, as well as provision of leadership opportunities focused on the instructional program.

Teacher Skills Development

- Providing teachers with an increased variety & scope of task assignments (e.g., involvement in curriculum development & revision), along with explicitly recognizing the additional time required of them for such duties within the evaluation/reward structure

- Reviewing teacher-certification requirements to determine the adequacy for licensure of top-quality instructional professionals

- Offering "educational specialists" the same opportunities for job enlargement/enrichment as those awarded to other teachers

- Providing year-round inservice opportunities with respect to such aspects of ongoing teacher skills enhancement as planning, instruction and principles of human growth & development

Teacher Leadership

- Providing opportunities to teachers for mentoring, peer coaching & similar activities, along with explicit recognition of the extended time requirements necessitated by such task assignments

- Directly incorporating a greater variety & scope of such opportunities for development of "teacher leaders," as part of districts' progression through the three recommended tiers of Career Ladder program participation

ADMINISTRATOR SKILLS DEVELOPMENT & LEADERSHIP

* Administrators must have the support of adequate leadership development and incentive programs. In particular, they should be integrally involved in all phases of planning, adoption and implementation of external change and improvement programs in order for positive results to be realized.

Administrator Skills Development

- Provision of adequate inservice & other necessary background information to administrators about external teacher-incentive programs such as Career Ladders, before such programs are actually implemented

Administrator Leadership

- Requirement of the majority of administrative, as well as teacher, support by confidential ballot, prior to adoption of external reform programs, i.e., teacher-incentive programs such as Career Ladders

- Opportunities for direct administrator involvement & input with respect to such key day-to-day issues of program implementation as evaluation of Career Ladder teachers and development of procedures to assess student achievement

Essential Interrelated Characteristics of Effective Schools: Support Factors

TEACHER & ADMINISTRATOR EVALUATION

* Evaluation of teacher and administrator performance requires valid and reliable criteria which fairly and objectively differentiate skills and leadership related to enhancing the school's instructional program and impacting student learning.

  - Ongoing development, periodic review & revision as necessary of locally appropriate evaluation processes and procedures

  - Opportunities for direct input from teachers & administrators into these local evaluation systems

  - Incorporation of the latest available quantitative & qualitative (multimethod) research technology in order to strengthen the reliability & internal validity of such locally based evaluation systems

MOTIVATION: EXTRINSIC & INTRINSIC

* Teachers are extrinsically motivated if they receive adequate compensation to focus their energies on the professional duties involved in the teaching/learning process. In addition, they need to be recognized for their current levels of teaching skills and leadership based on a fair and objective evaluation system. They are intrinsically motivated through being able to work in a cooperative and supportive environment which allows for individuality, trust and respect, creativity, skill development, and input and leadership in improving the learning environment.

  Motivation: Extrinsic

  - Ensuring that, whatever the total pool of available funds for current disbursement to Career Ladder program participants, the key feature to consider is that there must be in place an evaluation system which is perceived as fair by the participants & on which such monetary reward distribution is based

  - Considering compensation for attendance at workshops & other teacher-improvement activities

  - Staying alert to possible interpersonal & climate problems which may arise as a result of automatically starting out participants at the highest salary/bonus levels

Motivation: Intrinsic

- Recognizing the intrinsic satisfaction perceived by teachers with respect to "increased professionalism," by offering ample opportunities for mentoring, peer coaching & other teacher-leadership activities noted earlier

- Similarly, recognizing teachers' desire for skills development (unanimously documented in five years of research on all school districts involved in the Career Ladder pilot-test in Arizona) by increased provision of inservice & other professional-development activities noted above

LOCAL FINANCE & FUNDING (SALARY SCHEDULE)

* Local financial commitment should be adequate for recruiting and maintaining a highly qualified and motivated teaching staff. Salary schedules should reflect a differentiation of staff based on performance. However, monetary increments which are too large can result in financial hardships or potential morale problems due to competitiveness and jealousies among teachers.

  - Ensuring adequate funding being available for such necessary "start-up" activities as establishment of equitable evaluation system & local district research & development support activities, as opposed to allocating entire designated sums for increased teacher salaries

  - Continuing to monitor & ensure a truly "performance-based" approach to salary allocation

  - Maintaining participants' expressed desire for the separateness of Career Ladders compensation from the traditional salary schedule in formulating projected funding budgets

  - Sincere concern for fulfilling responsibility of "financial stewardship" (e.g., demonstrating tangible benefits, with respect to increased student achievement & teacher accountability, in exchange for public dollars received)

DISTRICT RESEARCH & DEVELOPMENT (PROGRAM EVALUATION)

* Districts must establish a locally based research and development operation to plan, study and document progress relative to the goal of accountability for student learning. This function would include periodic assessment, and improvement as necessary, of key organizational components, so as to maintain their proper focus upon student achievement. A major function of the R & D unit is to assist in establishing internally, or securing from outside sources, the necessary technological support to assess and improve district developmental needs using a variety of appropriate procedures.

  - Developing own local site-based research & development division to monitor program implementation & adjust objectives/outcomes to local conditions

  - Encouraging "objective 3rd-party" input/involvement in consulting with districts to help them incorporate the latest multimethod quantitative & qualitative technology into their own R & D units/activities

  - Development/maintenance of computerized personnel & student data bases

  - Providing separate funding, as a distinct line item in projected operating budgets, for R & D unit (as distinguished from funds allocated to increased teacher salaries, etc.)

  - Mandating ongoing review of other related state & national studies, in order to "keep current" as to latest developments by others implementing teacher-incentive programs

PROFESSIONAL INPUT (OWNERSHIP)

* In order for districts to develop a highly effective and efficient operation, all professionals must be knowledgeable about the essential elements which impact student achievement. In particular, teachers must be centrally involved in the development, implementation and continuing evaluation of all programs which affect them (i.e., the teacher evaluation system) and the instructional program (i.e., establishment of the curriculum and objectives and student assessment programs).

  - Requiring majority approval of program participation & continuation of participation by confidential ballot

  - Expanding teacher role beyond that of being merely "consultant," into meaningful, periodic & direct input into all aspects of program implementation/refinement (e.g., the leadership, student achievement & evaluation system tasks discussed in previous sections)

  - Capitalizing on the intrinsic satisfaction unanimously perceived by teacher & administrator input into such activities ("people help support that which they help create")

PROGRAM DESIGNS & STRUCTURES

* The optimal design and structure of a total school organization consists of the establishment of an overall operational pattern which is focused on teacher development and student learning. School organizations require a long-range plan which provides for assessment, restructuring and redeployment of resources to meet desired educational goals and to demonstrate accountability for the public trust.

  - Continuing to require applicant-districts to develop & submit well-documented proposed program plans which validly reflect local conditions relevant to program implementation, as a necessary prerequisite for participation

  - Building in graduated & flexible time-lines corresponding to improvements in readiness factors and qualification for "higher-tier" program participation

  - Requiring periodic evaluation & review by objective "outside, 3rd-party" agency which can help ensure that locally developed program designs & structures are free of undue special-interest influence

  - Providing explicit & ongoing focus on accountability & documentation of student achievement as the focal point of such program designs & structures

  - Encouragement of innovation in meeting local needs & conditions, as discussed earlier

LOCAL GOVERNING BOARD (UNDERSTANDING & SUPPORT)

* In order to become an effective school system, the local governing board needs to understand the essential elements of its school organization, the way in which these factors positively impact student learning, and how to be most supportive in meeting educational goals. Boards which play control politics, and which are under the undue influence of special interests, are extremely destructive to the development of a healthy organization and its focus on the proper purpose for existence.

  - Recognizing that the school board has been unanimously shown to be a critical factor determining the ultimate success or failure of external teacher-incentive programs, according to five years of research results on the Career Ladder pilot-test in Arizona

- Therefore, providing specially targeted inservice & other information to school boards concerning such programs prior to their actual implementation

- Mandating assessment of governing board's state of information/accurate knowledge by "objective 3rd-party" outside agencies, with respect to level of understanding & support of Career Ladder concepts and to determine if additional inservice/information provision is necessary

- Seeking & incorporating school board members' input relative to such key implementation issues as developing equitable evaluation systems

ORGANIZATIONAL CLIMATE, COMMUNICATION & MORALE

* Factors such as organizational climate, interpersonal channels of communication and psychological environment are critical to the successful operation of any essential interrelated component within school systems. Administrators, teachers, support staff and students must have a cooperative and supportive environment in order to reach individual potentials which, in turn, result in appreciable performance outcomes.

  - Ongoing monitoring of the specific effects of all aspects of program implementation on the existing interpersonal climate (e.g., any jealousies, rivalries or power struggles which may occur with respect to any particular rule or regulation)

  - Working actively to improve any/all currently dysfunctional aspects of interpersonal organizational structure by capitalizing on the intrinsic motivators referred to earlier (e.g., recognizing the increased satisfactions & cooperation with peers resulting from a "team approach" to development of an evaluation process)

  - Understanding the importance of "healthy & functional top-down & bottom-up channels of communication," by provision of timely, relevant & accurate information concerning all aspects of program implementation, so that participants can experience a "sense of listening, & being listened to"

  - Periodic reporting of local research activities & results to "overseeing" bodies such as legislature & steering committees

ASSESSMENT OF READINESS LEVELS FOR REFORM, POSITIVE CHANGE, & IMPROVEMENT

* The objectives of reform, positive change and improvement in education cannot be attained without a sincere commitment to the goals to be accomplished, as well as knowledge about how to direct and mobilize resources to achieve these goals. Total school systems must be ready to carry out the objectives of teacher development and student achievement efficiently and effectively. This readiness can only be achieved through accurate assessment and profiling of interrelated organizational components, as well as the development and implementation of a long-range, systematic evaluation and improvement plan for the total system and its relevant functioning elements.

  Change & Improvement (Long-Range Plans)

  - Ensuring overall focus on long-range student achievement & related teacher accountability by acquiring the latest multimethod technology for assessing learning trends

  - Similarly, incorporating the latest procedures for teacher skills development into instruction & practice

structure, & initiating corrective action as required for any/all support/focus factors needing remediation

- Maintaining ongoing functional channels of communication with all affected parties, such as administrators, school board members, parents & legislators

District Readiness Level (Assessment)

- Applying the multimethod "profiling" technological procedure to assess the current "level of operational health" of each organizational support & focus factor, as a necessary pre-condition of program participation & continuation

- Adopting a "several-tiered" level of program participation based upon current overall readiness level to benefit from such a program, as indicated by results of applying this "profiling" procedure

- Ongoing evaluation/monitoring of program impact on the current level of each organizational component, & initiating timely corrective action to improve those individual components needing such remediation

Support of Outside Forces Impacting Teacher Development & Student Achievement

* All outside forces impacting school organizations, such as legislation, policy guidelines, governing boards, universities and business and industry, must fully understand the needs and goals of school systems. In addition, they may need to restructure operations and redeploy resources in order to meet specific needs of school district systems.

PROFESSIONAL NETWORKS

- Recognizing the informational & interpersonal benefits of a regular means of interaction with others who are also struggling with similar program implementation

- Maintaining independence of such professional networks from influence/functioning of formal governing boards

- Requiring all funded Career Ladder districts to participate periodically in such professional networks, as a condition for receipt of program funding

STATE FINANCE & FUNDING (SALARY SCHEDULE)

- Ensuring adequate funding being available for such necessary "start-up" activities as establishment of an equitable evaluation system & local district research & development support activities, as opposed to allocating entire designated sums for increased teacher salaries

- Continuing to monitor & ensure a truly "performance-based" approach to salary allocation

- Maintaining participants' expressed desire for the separateness of Career Ladders compensation from the traditional salary schedule in formulating projected funding budgets

- Sincere concern for fulfilling responsibility of "financial stewardship" (e.g., demonstrating tangible benefits, with respect to increased student achievement & teacher accountability, in exchange for public dollars received)

STATE GOVERNING BOARD (ACCOUNTABILITY/IMPLEMENTATION)

- Formulation of policy guidelines to encourage Career Ladder districts to adopt the comprehensive Arizona Department of Education (ADE) curriculum
- Encouragement of these districts to assist ADE in ongoing validation, monitoring & necessary revision(s) of assessment plans

LEGISLATIVE GUIDELINES

- Maintaining proper long-range focus on improved student achievement in intellectual, social & emotional areas, as well as increased teacher accountability for such achievement
- Maintaining the proper balance of sufficient structure/detail, along with sufficient recognition of local diversity which may necessitate some flexibility in the legislative guidelines

ANALYSIS OF RESEARCH VARIABLES, PROGRAM EVALUATION & IMPROVEMENT

- Provision of mechanisms for ongoing monitoring of all possible local factors which may impact successful program implementation (e.g., ideally, through a site-based R & D unit within the district)
- Provision of timely, relevant & accurate information to internal (administrators) & external (legislators, school-board members, & parents) decision makers & affected parties concerning the current state of program implementation
- Applying aforementioned "profiling" procedure to detect areas needing improvement in a timely manner
- Initiating prompt corrective action as necessary for organizational support & focus factors which are currently below par, in order to ensure maximal program success

Summary

Overview

In 1985, the Arizona Legislature established a five-year career ladder pilot program under the direction of the Joint Legislative Committee on Career Ladders (JLCCL). The purpose was to implement a program for rewarding teachers based on actual performance, rather than solely on years of experience and accumulated college credits. Research and evaluation of the program in the 14 presently participating districts is being conducted by the Center for Excellence in Education at NAU in cooperation with researchers from the U of A and ASU. A number of doctoral dissertations are also focusing on various aspects of program implementation.

Concepts Crucial to Program Reform. The researchers have developed a model of essential organizational components which must be functioning at healthy levels for effective reform. They consist of *focus factors*, such as student achievement and teacher development & leadership. Critical *support factors* include such components as teacher & administrator evaluation; motivation; professional input & ownership; and program designs & structures. *Essential elements for educational improvement & success*

are at the base of the model and include professional networks; state finance & funding; and legislative guidelines. These individual organizational components need to be assessed as to their current readiness to support an external teacher incentive program within the district. In doing so, each district must address the following issues: (1) Has there been adequate restructuring of all interrelated district components which impact teacher development & student learning? (2) Is teacher performance appropriately assessed? (3) Is the teacher evaluation system perceived as fair & objective? Finally, as reported in Appendix B, those schools which have achieved the integration of essential program and organizational functions have realized a correspondingly dramatic impact upon the goals of teacher development and student learning.

References

Packard, R. D., & Dereshiwsky M. I. (1990, January). Final accumulative results & transfer of knowledge of the Arizona Career Ladder Research & Evaluation Project. Document submitted for use by the Arizona State Legislature, school districts, educational researchers & interested professionals. State Capitol, Senate Wing, Phoenix, Arizona.

Packard, R. D., & Dereshiwsky M. I. (1990, April 5). Specific indicators of accountability in school organizations: Assessment, profiling, restructuring & redeployment of resources. Paper presented to the Educational Accountability Summit, Phoenix, Arizona.